56615-2

OREGON LABOR TRENDS

APRIL 1991

State of Oregon • Employment Division • Department of Human Resources

INDICATORS

UNEMPLOYMENT RATE

Oregon (Seas. Adj.)

Feb.	1991	5.8
Jan.	1991	5.9
Feb.	1990	5.4

United States (Seas. Adj.)

Feb.	1991	6.5
Jan.	1991	6.2
Feb.	1990	5.3

WAGE AND SALARY EMPLOYMENT INDEX

Oregon (1977=100)

Feb	1991	134.9
Jan.	1991	135.2
Dec.	1990	133.9
Nov.	1990	134.0
Oct.	1990	133.9

PRODUCTION WORKER AVERAGE HOURLY EARNINGS

Oregon

Jan.	1991	$11.47
Dec.	1990	$11.34
Jan.	1990	$11.09

PRODUCTION WORKER AVERAGE WEEKLY HOURS

Oregon

Jan.	1991	38.4
Dec.	1990	40.0
Jan.	1990	38.6

CONSUMER PRICE INDEX (CPI)

1982-84=100
ALL URBAN CONSUMERS

Portland-Vancouver

July-Dec. 1990	129.8
Yearly change	6.7%
Annual Average 1990	127.4
Yearly change	5.8%

United States

Feb. 1991	134.8
Yearly change	5.3%
Annual Average 1990	130.7
Yearly change	5.4%

Portland Hotline 326-4132

LOOKING FOR A RAINBOW

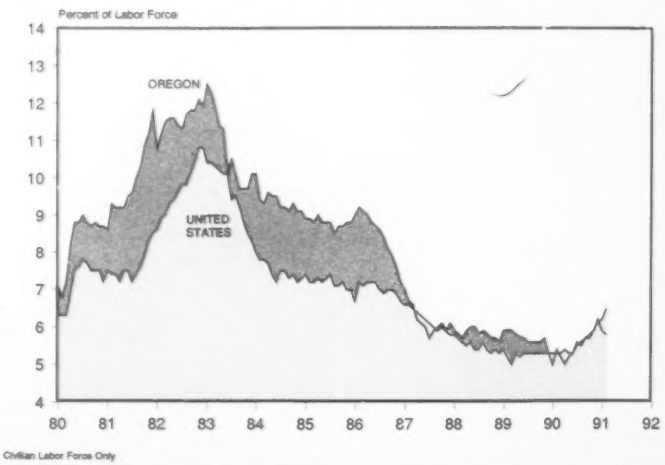
Duane Ackerson

Follow the fellow
Who follows a dream.

"Look to the Rainbow"
(E.Y. Harburg/ Burton Lane)

It was dark as an oil spill in my dream, but somewhere in the dark I could hear someone singing "Look to the Rainbow" from the musical *Finian's Rainbow*. Then, the song faded and I could hear the "Good Old Days" talking. Its voice was dark, too, and crackly, like something coming over an old Magnavox radio someone was attempting to tune; the clarity and volume kept coming and then going again. So I could hear only fragments: ". . . good old days I'm speaking . . ."; ". . . twelve cents . . . loaf of bread . . ."; ". . . walk to the store . . . penny candy . . . nickel Coke . . ." After listening a while, I heard another voice, this one much clearer and sharper, cut in: "I'm sorry, dude, but we are not here. It would be most excellent if you would leave a message and we'll get back to you when we're back." At that point, the line holding my ear to the dream was disconnected. I felt myself falling through the darkness toward a small point of light. I remember thinking, **so this is what the end is like**. However, it was not the end, just another confusing beginning. I pushed through the membrane of light into a sort of half light, and found myself standing in the dark in what appeared to be a theater. I was focussing a single follow spot on the stage, where the events of February 1991 had just played themselves out, attempting to throw some light over the shadows left by those events. I just hoped no one would realize I didn't belong to any theatrical guild; I also hoped I knew how to operate this thing . . .

SEASONALLY ADJUSTED UNEMPLOYMENT RATES
OREGON AND THE UNITED STATES



OREGON NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT
(BY PLACE OF WORK)

INDUSTRY	FEB.1/ 1991	JAN.2/ 1991	FEB. 1990	CHANGE FROM JAN. 1991	CHANGE FROM FEB. 1990
TOTAL 5/	1,239,200	1,235,800	1,209,300	3,400	29,900
WAGE & SALARY EMPLOYMENT INDEX 6/	134.9	135.2	131.7	XXX	XXX
GOODS PRODUCING INDUSTRIES 7/	256,600	257,800	260,100	- 1,200	- 3,500
SERVICE PRODUCING INDUSTRIES 8/	982,600	978,000	949,200	4,600	33,400
TOTAL MANUFACTURING	205,900	207,900	214,000	- 2,000	- 8,100
DURABLE GOODS	148,800	150,200	157,200	- 1,400	- 8,400
LUMBER & WOOD PRODUCTS	55,900	56,900	64,000	- 1,000	- 8,100
LOGGING	9,800	9,600	10,300	200	- 500
SAWMILLS	19,300	19,600	22,500	- 300	- 3,200
VENEER & PLYWOOD	11,300	11,700	15,000	- 400	- 3,700
MILLWORK & STRUCTURAL WOOD	9,500	9,900	10,400	- 400	- 900
MOBILE HOMES	2,100	2,100	1,800	0	300
OTHER WOOD PRODUCTS	3,900	4,000	4,000	- 100	- 100
FURNITURE AND FIXTURES	2,900	2,900	3,100	0	- 200
STONE, CLAY, GLASS & CONCRETE	4,100	4,100	4,000	0	100
PRIMARY METALS	11,300	11,300	11,000	0	300
BLAST FURNACES, IRON & STEEL 9/	5,800	5,800	5,600	0	200
NONFERROUS METALS 9/	5,500	5,500	5,400	0	100
FABRICATED METALS	11,100	11,200	11,700	- 100	- 600
FABRICATED STRUCTURAL METALS	4,700	4,800	4,900	- 100	- 200
OTHER FABRICATED METALS	6,400	6,400	6,800	0	- 400
MACHINERY	16,600	16,700	17,900	- 100	- 1,300
OFFICE & COMPUTING MACHINES	4,200	4,200	4,600	0	- 400
OTHER MACHINERY	12,400	12,500	13,300	- 100	- 900
ELECTRONIC & OTHER ELECTRIC EQUIPMENT 9/	17,700	17,700	17,100	0	600
TRANSPORTATION EQUIPMENT	13,500	13,600	12,100	- 100	1,400
INSTRUMENTS & RELATED PRODUCTS 9/	11,800	11,900	12,500	- 100	- 700
MISCELLANEOUS MANUFACTURING	3,900	3,900	3,800	0	100
NONDURABLE GOODS	57,100	57,700	56,800	- 600	300
FOOD & KINDRED PRODUCTS	21,200	21,500	21,100	- 300	100
CANNING & PRESERVING	9,700	9,900	10,200	- 200	- 500
OTHER FOOD PRODUCTS	11,500	11,600	10,900	- 100	600
TEXTILE MILL PRODUCTS	1,500	1,500	1,700	0	- 200
APPAREL	2,800	2,900	2,800	- 100	0
PAPER & ALLIED PRODUCTS	9,300	9,200	9,000	100	300
PRINTING & PUBLISHING	14,400	14,500	13,900	- 100	500
CHEMICALS & ALLIED PRODUCTS	2,300	2,300	2,300	0	0
PETROLEUM & ASPHALT PRODUCTS	500	600	600	- 100	- 100
RUBBER & PLASTIC PRODUCTS	4,700	4,700	4,900	0	- 200
LEATHER PRODUCTS	400	500	500	- 100	- 100
TOTAL NONMANUFACTURING	1,033,300	1,027,900	995,300	5,400	38,000
MINING & QUARRYING	1,500	1,500	1,300	0	200
CONSTRUCTION	49,200	48,400	44,800	800	4,400
BUILDING CONSTRUCTION	11,800	11,600	12,100	200	- 300
HEAVY CONSTRUCTION	6,100	6,100	5,000	0	1,100
SPECIAL TRADE CONTRACTORS	31,300	30,700	27,700	600	3,600
TRANSPORTATION, COMMUNICATIONS, & UTILITIES	63,400	63,000	62,900	400	500
TRANSPORTATION	42,300	42,000	41,500	300	800
RAILROAD	3,700	3,700	3,800	0	- 100
TRUCKING & WAREHOUSING	24,000	23,800	23,600	200	400
OTHER TRANSPORTATION	14,600	14,500	14,100	100	500
COMMUNICATIONS	12,200	12,100	12,500	100	- 300
UTILITIES	8,900	8,900	8,900	0	0
TRADE	308,400	310,800	299,600	- 2,400	8,800
WHOLESALE TRADE	80,700	80,500	76,600	200	4,100
DURABLE GOODS	46,200	46,200	44,600	0	1,600
MACHINERY, EQUIPMENT, & SUPPLIES	10,500	10,700	10,500	- 200	0
OTHER DURABLE GOODS	35,700	35,500	34,100	200	1,600
NONDURABLE GOODS	34,500	34,300	32,000	200	2,500
GROCERIES & RELATED PRODUCTS	12,900	13,200	12,000	- 300	900
OTHER NONDURABLE GOODS	21,600	21,100	20,000	500	1,600
RETAIL TRADE	227,700	230,300	223,000	- 2,600	4,700
BUILDING MATERIALS & GARDEN SUPPLIES	8,600	8,600	7,800	0	800
GENERAL MERCHANDISE	28,700	30,900	29,500	- 2,200	- 800
FOOD STORES	38,200	38,400	37,600	- 200	600
AUTO DEALERS & SERVICE STATIONS	27,400	27,400	27,300	0	100
APPAREL & ACCESSORY STORES	9,800	10,400	9,200	- 600	600
FURNITURE & HOME FURNISHINGS	9,300	9,300	9,400	0	- 100
EATING & DRINKING PLACES	81,400	81,000	78,700	400	2,700
MISCELLANEOUS RETAIL	24,300	24,300	23,500	0	800
FINANCE, INSURANCE, & REAL ESTATE	80,500	80,000	77,000	500	3,500
FINANCE	28,600	28,600	28,400	0	200
INSURANCE	23,100	23,000	22,600	100	500
REAL ESTATE	28,800	28,400	26,000	400	2,800
SERVICES	300,700	298,200	286,800	2,500	13,900
HOTELS & OTHER LODGING PLACES	18,400	18,200	17,500	200	900
PERSONAL SERVICES	11,000	10,800	11,200	200	- 200
BUSINESS SERVICES	49,500	49,700	47,800	- 200	1,700
AUTOMOTIVE & MISC. REPAIR SERVICES	17,000	16,900	16,000	100	1,000
MOTION PICTURES & AMUSEMENTS	14,500	14,500	14,300	0	200
HEALTH SERVICES	87,100	86,600	83,400	500	3,700
LEGAL SERVICES	9,000	8,900	8,700	100	300
PRIVATE EDUCATION	17,900	16,800	15,700	1,100	2,200
SOCIAL SERVICES	27,900	27,700	26,400	200	1,500
ENGINEERING & MANAGEMENT SERVICES	21,400	21,400	20,100	0	1,300
OTHER SERVICES & NEC	27,000	26,700	25,700	300	1,300
GOVERNMENT	229,600	226,000	222,900	3,600	6,700
FEDERAL GOVERNMENT	31,700	32,300	31,200	- 600	500
STATE GOVERNMENT	62,600	61,400	60,800	1,200	1,800
EDUCATION	26,500	25,300	26,300	1,200	200
OTHER STATE	36,100	36,100	34,500	0	1,600
LOCAL GOVERNMENT	135,300	132,300	130,900	3,000	4,400
EDUCATION	87,200	84,400	84,100	2,800	3,100
OTHER LOCAL	48,100	47,900	46,800	200	1,300
LABOR-MANAGEMENT DISPUTES 10/	0	0	600	0	- 600

OREGON RESIDENT LABOR FORCE
(BY PLACE OF RESIDENCE)

	FEB.1/ 1991	JAN.2/ 1991	FEB. 1990	CHANGE FROM JAN. 1991	CHANGE FROM FEB. 1990
CIVILIAN LABOR FORCE 3/	1,476,000	1,463,500	1,451,500	12,500	24,500
UNEMPLOYMENT	98,800	99,800	90,800	- 1,000	8,000
PERCENT OF LABOR FORCE	6.7	6.8	6.3	XXX	XXX
SEASONALLY ADJUSTED PERCENT	5.8	5.9	5.4	XXX	XXX
TOTAL EMPLOYMENT 4/	1,377,200	1,363,700	1,360,700	13,500	16,500

1/ Preliminary
2/ Revised
3/ Includes employed and unemployed individuals 16 years and older, adjusted for multiple job-holding and commuting.
4/ Includes nonagricultural wage and salary, self-employed, unpaid family workers, domestics, farm workers, and labor disputants.
5/ Includes full- and part-time nonfarm wage and salary workers in pay periods including the 12th of the month. Proprietors, self employed, private household workers and armed forces excluded. Note: These data are estimated in cooperation with the U.S. Bureau of Labor Statistics and the Employment and Training Administration. All data are based on the 1987 Standard Industrial Classification (SIC) codes.
6/ Total nonagricultural wage and salary employment, seasonally adjusted, and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of 0.8264, the ratio between 1972's annual average employment (774,300) and that of 1977 (936,900).
7/ Goods producing industries include manufacturing, mining, and construction.
8/ Service producing industries include transportation, communications, and utilities; trade; finance, insurance, and real estate; services; and government.
9/ Series break. Data for 1988 and thereafter are not comparable to those for 1987 and before.
10/ Employees involved in labor disputes are not included in wage and salary employment counts.

Center stage: looking at the light still adhering to February, it was relatively easy to see that though Oregon upstaged the nation, this was in large part because the national performance was so poor. The statewide unemployment rate was down 0.1 to 5.8% from the month before. However, small changes in the rate at the state level can easily conceal important shifts at locals levels. For example, a preliminary overview of recently revised data indicates that two MSA's (Metropolitan Statistical Areas) and eleven counties increased their annual average unemployment rates between 1988 and 1989; one MSA and eight countinues saw increases in these rates between 1989 and 1990. Downstage, the U.S. unemployment rate was up 0.3 from January to 6.5%; unemployment had reached this level by rising from a rate of 5.2 as recently as in June of the preceding year. This was also the highest unemployment rate the country had experienced in four years, prompting the Federal Reserve to cut a key interest rate by a quarter of a percentage point (*The Washington Post*, March 9, page 1). The pressure is also on to provide for the rising number of the unemployed; Congress is now acting on a supplemental appropriations bill for $150 million more to handle the processing of additional unemployment claims. The Labor Department also reported that a minimum of 628,000 previously insured workers have exhausted benefits without finding new jobs; it also estimated the number may actually be an high as a million (David S. Broder; *Washington Post*, March 17). Of course, for every problem, there a proposed solution; Congressional supporters of a bill that would cut the Social Security payroll tax claim such a legislative action, based on their study, would create 650,000 new jobs and increase the Gross National Product by as much as $226 billion through year 2000. (*Daily Labor Report*, March 15, page A-13) This should about take care of the problem, allowing those workers who have exhausted benefits to stage a comeback if they can can hold out, in some instances, for another nine years. In the shorter run, economists are hopeful that the end of the war with Iraq could give the economy a lift.

NONFARM WAGE & SALARY EMPLOYMENT INDEXES
(SEASONALLY ADJUSTED)

On the employment side in the bill, there was a seasonally adjusted decline of 2,800 jobs in Oregon's nonagricultural wage and salary employment. This decline, however, was in part due to strong job performance in January. The seasonally adjusted, revised figures for January showed a jump of 12,300 from December.

The light was at its dimmest over the February performances in manufacturing and services. Every sector of manufacturing suffered declines, for a seasonally adjusted drop of 2,900 in that industry grouping. Sawmill employment has declined by 3,200 in the past year, reaching the same point it was at in the 1982 recession. Another hard-hit industry, veneer and plywood, now employs half as many people as it did in the 1970s, having lost 3,700 jobs in a year's time. The timber dependent communities of the state have been especially hard hit by the national economic slowdown, especially its negative impact on construction in most parts of the country. The overall statistics for the

state don't tell us much about the economic woes of cities like Roseburg, Coos Bay, and Sweet Home, much less the small communities near these cities.

Within manufacturing, the spotlight fell on transportation equipment, which showed continued strength, helping to prop things up with an employment increase of 1,400 over the year. Within this, ship building and repair was near the top of the bill; currently at 4,200, it displays nearly twice the employment of a year ago.

Despite strong supporting performances by health services and private education, services played out a decline, seasonally adjusted, of 2,800.

Though construction declines elsewhere in the country affected lumber and wood products employment in Oregon, construction in Oregon continues to be the star of the show. In February, it drew applause with an employment increase of 800; special trade contractors (+600) benefited in particular from the mildness of the weather.

On the regional stage, owls and salmon once more flew and swam into the Northwest picture. A group of biologists and non-biologists will be meeting to develop an owl recovery plan. This group is facing a May 1 deadline set by a U.S. District Court for the U.S. Fish and Wildlife Service to designate habitat necessary to the survival of the northern spotted owl. A Northwest Salmon Summit also met in Portland March 4 to approve a recovery plan for five salmon stocks, including coho salmon in the Lower Columbia. Senator Mark Hatfield, who had called for this summit previously in response to petitions to protect five salmon stocks under the Endangered Species Act, praised the efforts of this group but "said the plan doesn't go far enough to prevent an endangered species listing for the five stocks." (*The Oregonian*, page B-1, March 5, 1991)

Moving from fish and fowl to humans: among the massive amount of data being released from the 1990 Census is a statistic with some ominous implications for both employment and unemployment in this country, and beyond that, for the country as a whole. The Census shows that the U.S. is becoming a suburban nation, with an unprecedented movement of both jobs and population away from the old central cities; now, the majority of our population lives in 39 metropolitan areas, each with a million residents or more. *The New York Times* (March 3, page E5) suggests this may set the stage for a national labor gap, with employers separated from the largest group of new workers, the poor minority population. A further implication of this trend is that we might see the worst of both worlds in the future: labor shortages, from the perspective of suburban employers, and job shortages from the perspective of the inner city poor, with never the twain meeting.

While training the light on the stage where February had made its brief appearance in the limelight, I also had occasion to think about the human quest for security, whether economic or other. Though it might have become fashionable to disparage the idea of "That Great Come 'n' Get It Day," was it that wrong to feel everyone was entitled to a decent break? That there was enough world to go around, as long as people didn't spill oil in the Persian Gulf like greedy children at a party, knocking over someone else's chocolate milk when they didn't get a second glass?

Suddenly, the figure of the "Good Old Days" appeared on the stage. Though I had only heard him earlier, I could tell in a blink it was he; he looked a little like a cross between Santa Claus, Og the leprechaun from *Finian's Rainbow*, and Rip Van Winkle, with a little Jimmy Stewart thrown in assist in the characterization. He reached into his sack, which resembled the sort of sand bag used as a counterweight to lift sets. While reaching inside, he began to recite: "Ten cent loaf of bread . . . work for everyone who wants to . . . a chicken in every garage . . . a pot in every rainbow . . . crosses of gold for labor . . ." However, none of these things emerged from the sack: just sand, which he began to scatter over the audience. I felt my eyes grow heavy, and the light I was working begin to dim, fade into a pencil-sized pen light, then a bouncing ball of light that escaped from my hands, dancing over the stage, as the Good Old Days faded again to just a crackle of voice, singing this time: "Mr. Sandman, bring me a dream . . ."

Then, on the darkened stage in my mind, one dream followed another, and March came in like a line: an actor's, that is. Unfortunately, March wasn't the only month that came in. I appeared to be seeing the concluding scene of Thornton Wilder's *The Skin of Our Teeth*, in which the hours of the night each come on stage, each with the name of a famous philosopher, and quoting the thinker's words. This time, though, each hour was a month attempting to tell its tale, all speaking at once. In the midst of this growing chaos, Sabina, the maid who has the final say in Wilder's play, appeared to have the last word once more:

"The whole world's at sixes and sevens, and why the house hasn't fallen down about our ears long ago is a miracle to me." She comes down to the footlights. "This is where you came in. We have to go on for ages and ages yet.

"You go home.

"The end of this play isn't written yet." □

MINIMAL TOTAL BENCHMARK REVISION

David Cooke

The Oregon nonagricultural wage & salary totals printed every month in this publication are based on information provided by a sample of Oregon firms. These estimated employment totals for the prior two years are replaced every February when the Employment Division completes its annual benchmark revision. Estimated totals are replaced with near-universe counts based on unemployment insurance tax records and other records.

This year the revision for total nonagricultural wage & salary employment was very small. The 1990 annual average total was only 1,800 higher than the earlier estimated figure, a 0.1% change.

But, within this very slight revision at the total level lie a few more significant changes. The most significant annual average revisions occurred in construction, which was revised upward by 6.1%; in finance, insurance, and real estate, which was revised upward by 3.0%; and in trade, which was revised downward by 2.9%. These revisions at the major industry level tended to cancel out one another when all industries were added to produce the total wage & salary averages.

The revised benchmark figures show that Oregon's wage & salary employment grew at a 3.2% rate between 1989 and 1990. This confirms the slowdown in growth that Oregon experienced in 1990. But the growth rate in 1990 was fairly strong compared to the national rate for the same period, and compares favorably with the growth rates of the last five years:

OREGON ANNUAL AVERAGE EMPLOYMENT GROWTH

1990	3.2%
1990	4.6%
1988	5.1%
1987	3.9%
1986	2.8%

State of Oregon
EMPLOYMENT DIVISION
Department of Human Resources

Research and Statistics
March 1990 Benchmark
April 1991

OREGON RESIDENT LABOR FORCE, UNEMPLOYMENT & EMPLOYMENT 1989 1/

	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
CIVILIAN LABOR FORCE	1,475.0	1,462.0	1,469.0	1,463.7	1,481.2	1,471.6	1,502.5	1,508.8	1,487.1	1,460.7	1,464.8	1,466.6	1,461.7
UNEMPLOYMENT	84.0	99.8	98.9	94.5	87.8	81.9	85.5	84.8	77.2	73.5	72.5	77.1	74.2
Percent of Labor Force	5.7	6.8	6.7	6.5	5.9	5.6	5.7	5.6	5.2	5.0	4.9	5.3	5.1
Seasonally Adjusted Percent	5.7	5.9	5.9	5.9	5.8	5.7	5.7	5.6	5.6	5.6	5.6	5.7	5.3
TOTAL EMPLOYMENT	1,391.0	1,362.2	1,370.1	1,369.2	1,393.4	1,389.7	1,417.0	1,424.0	1,409.9	1,387.2	1,392.3	1,389.5	1,387.5

OREGON NONAGRICULTURAL WAGE & SALARY EMPLOYMENT 1989 3/

TOTAL WAGE & SALARY EMPLOYMENT	1,209.4	1,159.7	1,162.1	1,176.7	1,186.3	1,204.6	1,227.2	1,211.6	1,225.1	1,239.6	1,240.6	1,239.4	1,239.6
Wage & Salary Emp. Index (1977=100) 4/	129.1	126.7	126.4	127.5	127.5	128.3	129.3	129.5	130.0	130.6	130.4	130.8	131.7
GOODS PRODUCING 5/	266.0	248.7	245.7	250.6	254.5	259.7	271.7	277.4	283.6	282.4	276.7	271.1	269.3
SERVICE PRODUCING 6/	943.4	911.0	916.4	926.1	931.8	944.9	955.5	934.2	941.5	957.2	963.9	968.3	970.3
MANUFACTURING, TOTAL	218.4	209.1	206.5	208.5	209.9	212.6	222.5	226.5	231.3	229.5	224.6	220.6	219.3
Durable Goods	159.7	156.4	152.2	154.5	154.5	156.8	163.2	164.9	165.1	164.5	161.2	160.7	161.8
Lumber & Wood Products	67.3	67.5	63.1	63.5	63.8	64.6	70.1	70.5	70.3	69.8	68.6	68.1	67.3
Logging	12.5	11.7	11.4	11.0	10.8	11.6	13.2	13.6	13.8	13.8	13.5	13.0	12.1
Sawmills	22.7	22.2	21.3	21.6	22.1	22.3	23.6	23.7	23.6	23.3	22.9	22.8	22.9
Veneer & Plywood	15.7	17.3	14.6	14.7	14.6	14.4	16.4	16.5	16.1	15.0	15.8	15.8	15.9
Millwork & Structural Wood	10.4	10.1	10.1	10.4	10.4	10.5	10.7	10.6	10.6	10.5	10.4	10.5	10.5
Mobile Homes	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8
Other Wood Products	4.2	4.4	3.9	4.0	4.1	4.0	4.4	4.3	4.4	4.4	4.2	4.2	4.1
Furniture & Fixtures	3.0	2.9	2.9	3.0	2.9	3.0	3.0	3.0	3.1	3.1	3.1	3.1	3.1
Stone, Clay, Glass, & Concrete	4.2	4.0	3.9	4.0	4.1	4.3	4.3	4.4	4.4	4.4	4.4	4.3	4.2
Primary Metals	10.8	10.4	10.4	10.6	10.7	10.7	11.0	11.2	11.3	11.1	10.9	10.9	10.9
Blast Furnaces, Iron & Steel	5.6	5.3	5.4	5.5	5.5	5.5	5.6	5.7	5.8	5.7	5.6	5.6	5.6
Nonferrous Metals	5.3	5.1	5.0	5.1	5.2	5.2	5.4	5.5	5.5	5.4	5.3	5.3	5.3
Fabricated Metals	12.4	12.2	12.4	12.7	12.7	12.5	12.4	12.4	12.5	12.3	12.2	12.3	12.2
Fabricated Structural Metals	5.3	5.3	5.5	5.7	5.7	5.4	5.2	5.1	5.2	5.0	5.0	5.0	5.0
Other Fabricated Metals	7.1	6.9	6.9	7.0	7.0	7.1	7.2	7.3	7.3	7.3	7.2	7.3	7.2
Machinery	17.8	16.9	17.0	17.1	17.4	17.7	17.9	18.2	18.4	18.3	18.4	18.4	18.3
Office & Computing Machines	4.5	4.2	4.2	4.2	4.3	4.4	4.5	4.6	4.8	4.8	4.8	4.8	4.7
Other Machinery	13.3	12.7	12.8	12.9	13.1	13.3	13.4	13.6	13.6	13.5	13.6	13.6	13.6
Electronic & Other Electric Equip.	15.7	15.1	14.9	15.1	15.0	15.3	15.6	15.9	16.2	16.3	16.3	16.5	16.7
Transportation Equipment	11.6	11.0	11.1	11.8	11.2	12.1	12.0	12.4	12.1	12.4	10.5	10.4	12.6
Instruments & Related Products	12.6	12.6	12.6	12.7	12.7	12.7	12.8	12.8	12.7	12.7	12.5	12.4	12.5
Miscellaneous Manufacturing	4.1	3.8	3.9	4.0	4.0	3.9	4.1	4.1	4.1	4.1	4.3	4.3	4.0
Nondurable Goods	58.8	52.7	54.3	54.0	55.4	55.8	59.3	61.6	66.2	65.0	63.4	59.9	57.5
Food & Kindred Products	23.6	19.4	20.1	19.5	20.6	20.8	23.8	26.0	30.2	29.2	27.6	24.0	21.5
Canning & Preserving	12.7	9.2	9.9	9.4	10.3	10.1	12.9	15.0	19.1	18.0	16.1	12.4	10.1
Other Food Products	10.9	10.2	10.2	10.1	10.3	10.7	10.9	11.0	11.1	11.2	11.5	11.6	11.4
Textile Mill Products	1.8	1.7	1.7	1.7	1.7	1.8	1.8	1.8	1.8	1.8	1.8	1.7	1.7
Apparel	2.7	2.6	2.6	2.7	2.7	2.6	2.7	2.7	2.8	2.8	2.8	2.9	2.9
Paper & Allied Products	9.1	8.4	9.1	9.0	9.0	9.1	9.3	9.3	9.3	9.2	9.1	9.1	9.2
Printing & Publishing	13.5	13.1	13.1	13.2	13.3	13.4	13.5	13.5	13.6	13.6	13.8	13.9	14.0
Chemicals & Allied Products	2.2	2.1	2.1	2.1	2.2	2.2	2.2	2.3	2.3	2.3	2.2	2.2	2.2
Petroleum & Asphalt Products	0.6	0.4	0.4	0.5	0.5	0.5	0.6	0.6	0.7	0.7	0.6	0.6	0.6
Rubber & Plastic Products	4.9	4.6	4.7	4.8	4.9	4.9	5.0	5.0	5.0	4.9	5.0	5.0	4.9
Leather Products	0.5	0.4	0.5	0.5	0.5	0.5	0.4	0.4	0.5	0.5	0.5	0.5	0.5
NONMANUFACTURING, TOTAL	991.0	950.6	955.6	968.2	976.4	992.0	1,004.7	985.1	993.8	1,010.1	1,016.0	1,018.8	1,020.3
Mining & Quarrying	1.5	1.1	1.1	1.3	1.3	1.5	1.5	1.7	1.6	1.6	1.6	1.6	1.5
Construction	46.1	38.5	38.1	40.8	43.3	45.6	47.7	49.2	50.7	51.3	50.5	48.9	48.5
Building Construction	11.7	9.8	10.1	11.1	11.4	11.8	11.9	12.1	12.5	12.5	12.6	12.3	12.4
Heavy Construction	6.7	5.0	4.7	5.3	6.2	6.9	7.4	7.8	8.0	8.2	7.5	6.8	6.3
Special Trade Contractors	27.7	23.7	23.3	24.4	25.7	26.9	28.4	29.3	30.2	30.6	30.4	29.8	29.8

	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Transport., Comm., & Utilities	63.1	61.0	61.1	61.1	61.8	62.4	63.2	63.5	64.2	64.8	64.3	64.4	65.5
Transportation	41.7	40.1	40.1	40.0	40.6	41.1	41.7	41.9	42.6	43.2	42.9	42.9	43.8
Railroad Transportation	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.8
Trucking & Warehousing	24.1	23.0	22.9	22.8	23.0	23.4	24.0	24.6	25.0	25.0	24.9	24.8	25.6
Other Transportation	13.8	13.2	13.3	13.3	13.7	13.8	13.8	13.4	13.7	14.3	14.1	14.2	14.4
Communications	12.5	12.4	12.4	12.4	12.4	12.4	12.5	12.6	12.6	12.7	12.6	12.6	12.7
Utilities	8.8	8.5	8.6	8.7	8.8	8.9	9.0	9.0	9.0	8.9	8.8	8.9	9.0
Wholesale & Retail Trade	305.9	294.5	292.6	295.6	297.8	303.6	308.9	308.1	311.9	313.4	311.7	315.3	317.3
Wholesale Trade	76.4	74.5	74.9	75.7	75.3	75.7	76.7	77.0	78.3	78.6	77.3	76.8	76.3
Durable Goods	44.4	44.0	44.0	44.4	44.1	44.4	45.0	44.9	45.0	45.0	44.2	43.9	43.8
Machinery, Equipment, & Sup.	10.5	10.4	10.3	10.4	10.5	10.5	10.7	10.6	10.6	10.6	10.5	10.3	10.3
Other Durable Goods	33.9	33.6	33.7	34.0	33.6	33.9	34.3	34.3	34.4	34.4	33.7	33.6	33.5
Nondurable Goods	32.0	30.5	30.9	31.3	31.2	31.3	31.7	32.1	33.3	33.6	33.1	32.9	32.5
Groceries & Related Products	12.2	11.7	11.8	11.8	11.6	11.5	11.6	11.8	13.0	13.4	13.2	12.9	12.5
Other Nondurable Goods	19.8	18.8	19.1	19.5	19.6	19.8	20.1	20.3	20.3	20.2	19.9	20.0	20.0
Retail Trade	229.5	220.0	217.7	219.9	222.5	227.9	232.2	231.1	233.6	234.8	234.4	238.5	241.0
Building Materials & Garden Sup.	7.8	6.9	7.0	7.4	7.8	8.1	8.3	8.3	8.3	8.2	8.0	7.9	7.8
General Merchandise Stores	29.7	29.3	27.7	27.3	27.4	27.7	28.2	28.6	29.3	30.6	31.7	33.9	34.9
Food Stores	38.8	37.1	36.8	37.2	37.7	39.4	39.7	40.0	39.9	39.5	39.5	39.3	39.7
Auto Dealers & Service Stations	28.6	27.8	28.1	28.3	28.8	29.0	29.2	29.1	29.2	29.1	28.5	28.4	28.0
Apparel & Accessory Stores	9.7	9.4	9.0	9.0	8.9	9.2	9.9	9.7	9.9	9.8	9.7	10.6	11.1
Furniture & Home Furnishings	9.2	9.0	9.0	9.0	8.9	9.0	9.0	8.9	9.3	9.3	9.4	9.6	10.0
Eating & Drinking Places	81.7	77.0	77.0	78.5	80.1	82.3	84.7	83.8	84.5	84.6	82.9	82.4	82.1
Miscellaneous Retail	23.9	23.5	23.1	23.2	22.9	23.2	23.2	22.7	23.2	23.7	24.7	26.4	27.4
Finance, Insurance, and Real Estate	75.9	73.1	73.6	74.3	74.7	75.4	76.2	77.1	77.5	77.6	76.7	76.9	77.5
Finance	28.1	27.6	27.6	27.8	27.7	27.8	27.9	28.2	28.3	28.4	28.4	28.4	28.6
Insurance	22.3	22.1	22.2	22.2	22.2	22.3	22.4	22.4	22.4	22.4	22.5	22.4	22.5
Real Estate	25.5	23.4	23.8	24.3	24.8	25.3	25.9	26.5	26.8	26.8	25.8	26.1	26.4
Services	282.9	268.1	272.2	276.2	278.9	281.5	283.6	286.2	288.9	292.4	289.0	288.7	289.2
Hotels & Other Lodging Places	18.5	16.5	16.8	17.2	18.0	18.4	19.6	20.3	20.5	20.0	18.9	18.1	17.7
Personal Services	10.7	10.7	11.0	11.2	11.1	10.7	10.5	10.4	10.5	10.7	10.7	10.6	10.7
Business Services	47.9	43.8	44.7	45.3	46.1	47.3	48.1	48.4	49.3	50.7	50.3	50.4	50.5
Automotive & Misc. Repair Services	15.7	14.4	14.6	14.9	15.3	15.6	15.8	15.9	16.2	16.3	16.3	16.2	16.4
Motion Pictures & Amusements	14.3	13.5	13.6	14.0	14.2	14.6	14.6	15.3	15.6	15.2	13.4	13.9	14.1
Health Services	82.0	79.7	80.1	80.9	80.8	81.2	82.2	83.0	83.6	83.5	82.7	83.0	83.5
Legal Services	8.7	8.5	8.6	8.6	8.6	8.7	8.9	8.8	8.9	8.8	8.8	8.8	8.9
Private Education	14.5	14.6	15.4	15.4	15.6	15.2	12.6	11.8	12.0	14.8	15.6	15.5	14.9
Social Services	25.3	23.6	23.9	24.2	24.1	24.7	25.0	25.7	25.7	26.4	26.8	26.7	26.7
Engineering & Management Services	19.0	18.2	18.8	19.3	19.4	19.0	19.0	18.9	18.9	18.9	18.9	19.1	19.3
Other Services & NEC	26.3	24.6	24.7	25.2	25.7	26.1	27.3	27.7	27.7	27.1	26.6	26.4	26.5
Government	215.6	214.3	216.9	218.9	218.6	222.0	223.6	199.3	199.0	209.0	222.2	223.0	220.8
Federal Government	32.5	30.9	30.2	30.2	31.3	32.1	33.7	34.6	34.5	34.5	33.5	32.3	32.4
State Government	59.2	59.0	60.2	60.7	60.1	60.5	61.7	56.4	56.6	55.4	59.9	60.1	59.8
Education	24.2	24.5	25.6	25.8	25.4	25.7	25.8	20.5	20.1	20.1	25.3	25.8	25.5
Other State	35.0	34.5	34.6	34.9	34.7	34.8	35.9	35.9	36.5	35.3	34.6	34.3	34.3
Local Government	123.9	124.4	126.5	128.0	127.2	129.4	128.2	108.3	107.9	119.1	128.8	130.6	128.6
Education	77.0	79.8	81.7	82.7	81.7	82.4	79.8	59.4	58.5	70.7	81.7	84.0	82.1
Other Local	46.9	44.6	44.8	45.3	45.5	47.0	48.4	48.9	49.4	48.4	47.1	46.6	46.5
LABOR-MANAGEMENT DISPUTES	1.8	1.2	3.8	3.8	3.8	3.6	0.3	0.3	0.3	0.4	2.0	2.0	0.4

1/ Includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonagriculture wage and salary, self-employed, unpaid family workers, domestics, agriculture and labor disputants. ALL DATA ARE IN THOUSANDS.

2/ Sum of monthly estimates divided by 12. Unemployment rate derived by dividing unemployment by civilian labor force.

3/ This nonagricultural wage and salary employment series is based on the 1987 Standard Industrial Classification (SIC) manual. The data are by place of work and persons working multiple jobs are counted more than once. Workers involved in labor-management disputes are excluded from the wage and salary employment totals. ALL DATA ARE IN THOUSANDS.

4/ Total nonagricultural wage and salary employment, seasonally adjusted and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's annual average employment (774.3) and that of 1977 (936.9).

5/ Goods producing industries include manufacturing, mining, and construction.

6/ Service producing industries include transportation, communications, & utilities; trade; finance, insurance, & real estate; services; and government.

State of Oregon
EMPLOYMENT DIVISION
Department of Human Resources

Research and Statistics
March 1990 Benchmark
April 1991

OREGON RESIDENT LABOR FORCE, UNEMPLOYMENT & EMPLOYMENT 1990 1/

	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
CIVILIAN LABOR FORCE	1,491.0	1,458.6	1,451.5	1,440.0	1,459.5	1,488.4	1,518.1	1,515.5	1,531.9	1,511.4	1,513.6	1,508.4	1,495.2
UNEMPLOYMENT	82.0	87.2	90.8	82.2	74.8	75.3	80.6	85.1	79.1	77.8	78.4	83.3	89.5
Percent of Labor Force	5.5	6.0	6.3	5.7	5.1	5.1	5.3	5.6	5.2	5.1	5.2	5.5	6.0
Seasonally Adjusted Percent	5.5	5.0	5.4	5.2	5.0	5.2	5.3	5.6	5.5	5.7	5.8	5.9	6.2
TOTAL EMPLOYMENT	1,409.0	1,371.4	1,360.7	1,357.8	1,384.7	1,413.1	1,437.5	1,430.4	1,452.8	1,433.6	1,435.2	1,425.1	1,405.7

OREGON NONAGRICULTURAL WAGE & SALARY EMPLOYMENT 1990 3/

TOTAL WAGE & SALARY EMPLOYMENT	1,248.1	1,206.5	1,209.3	1,224.4	1,238.8	1,253.3	1,264.3	1,247.6	1,261.8	1,267.6	1,274.1	1,269.6	1,260.1
Wage & Salary Emp. Index (1977=100) 4/	133.2	131.9	131.7	132.7	133.1	133.5	133.2	133.3	133.8	133.6	133.9	134.0	133.9
GOODS PRODUCING 5/	272.9	261.7	260.1	264.4	267.8	272.0	277.0	284.2	289.2	285.3	279.0	269.7	264.5
SERVICE PRODUCING 6/	975.2	944.8	949.2	960.0	971.0	981.3	987.3	963.4	972.6	982.3	995.1	999.9	995.6
MANUFACTURING, TOTAL	218.8	215.0	214.0	215.1	215.2	217.8	221.9	227.0	230.4	226.1	219.7	213.4	210.2
Durable Goods	158.1	158.8	157.2	158.4	158.0	159.5	160.7	161.7	161.8	159.8	156.5	153.6	151.5
Lumber & Wood Products	63.6	65.5	64.0	64.5	64.4	64.7	65.6	66.0	65.4	64.1	61.9	59.2	57.5
Logging	11.1	11.0	10.3	10.1	10.2	10.9	11.7	11.9	12.2	12.2	11.9	10.6	9.7
Sawmills	21.6	22.5	22.5	22.5	22.3	22.3	22.1	22.1	21.8	21.3	20.5	19.9	19.7
Veneer & Plywood	14.3	15.8	15.0	15.5	15.4	14.9	14.8	14.8	14.2	13.6	12.9	12.4	11.9
Millwork & Structural Wood	10.6	10.4	10.4	10.5	10.6	10.7	11.0	11.0	10.9	10.7	10.4	10.2	10.1
Mobile Homes	2.0	1.8	1.8	1.8	1.8	1.9	1.9	2.0	2.1	2.1	2.1	2.1	2.2
Other Wood Products	4.1	4.0	4.0	4.1	4.1	4.0	4.1	4.2	4.2	4.2	4.1	4.0	3.9
Furniture & Fixtures	3.1	3.0	3.1	3.1	3.1	3.1	3.1	3.1	3.2	3.3	3.4	3.1	3.0
Stone, Clay, Glass, & Concrete	4.3	4.1	4.0	4.2	4.2	4.2	4.4	4.4	4.5	4.5	4.5	4.4	4.2
Primary Metals	11.2	11.0	11.0	11.0	11.1	11.1	11.2	11.5	11.4	11.4	11.4	11.3	11.3
Blast Furnaces, Iron & Steel	5.7	5.6	5.6	5.6	5.6	5.6	5.6	5.8	5.7	5.7	5.8	5.8	5.8
Nonferrous Metals	5.5	5.4	5.4	5.4	5.5	5.5	5.6	5.7	5.7	5.7	5.6	5.5	5.5
Fabricated Metals	11.6	11.8	11.7	11.6	11.4	11.5	11.7	11.8	11.8	11.8	11.7	11.5	11.3
Fabricated Structural Metals	5.0	4.9	4.9	4.9	4.8	4.9	5.1	5.1	5.1	5.1	5.1	5.1	4.8
Other Fabricated Metals	6.7	6.9	6.8	6.7	6.6	6.6	6.6	6.7	6.7	6.7	6.6	6.4	6.5
Machinery	17.7	17.8	17.9	18.0	18.0	18.0	18.1	18.1	17.8	17.7	17.3	17.1	16.7
Office & Computing Machines	4.5	4.5	4.6	4.6	4.6	4.6	4.6	4.6	4.4	4.5	4.5	4.4	4.2
Other Machinery	13.2	13.3	13.3	13.4	13.4	13.4	13.5	13.5	13.4	13.2	12.8	12.7	12.5
Electronic & Other Electric Equip.	17.5	17.0	17.1	17.3	17.3	17.5	17.4	17.5	17.8	17.8	17.7	17.7	17.7
Transportation Equipment	13.1	12.4	12.1	12.4	12.2	13.2	13.0	13.2	14.1	13.6	13.1	13.8	14.0
Instruments & Related Products	12.0	12.5	12.5	12.4	12.4	12.2	12.1	11.9	11.7	11.6	11.6	11.6	11.9
Miscellaneous Manufacturing	4.0	3.7	3.8	3.9	3.9	4.0	4.1	4.2	4.1	4.0	3.9	3.9	3.9
Nondurable Goods	60.7	56.2	56.8	56.7	57.2	58.3	61.2	65.3	68.6	66.3	63.2	59.8	58.7
Food & Kindred Products	24.6	20.6	21.1	21.6	21.7	22.3	24.9	28.7	31.8	29.8	26.7	23.5	22.5
Canning & Preserving	13.1	9.6	10.2	10.5	10.6	10.9	13.5	17.1	20.0	18.1	14.5	11.4	10.6
Other Food Products	11.5	11.0	10.9	11.1	11.1	11.4	11.4	11.6	11.8	11.7	12.2	12.1	11.9
Textile Mill Products	1.6	1.7	1.7	1.6	1.6	1.6	1.6	1.6	1.6	1.6	1.6	1.6	1.6
Apparel	2.9	2.8	2.8	2.8	2.9	2.9	2.9	2.8	2.9	2.8	2.9	2.8	2.9
Paper & Allied Products	9.1	9.0	9.0	8.5	8.7	9.1	9.4	9.6	9.5	9.3	9.2	9.2	9.2
Printing & Publishing	14.1	13.9	13.9	13.9	13.9	14.0	14.0	14.1	14.2	14.3	14.4	14.5	14.4
Chemicals & Allied Products	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.4	2.4	2.4	2.3	2.3	2.3
Petroleum & Asphalt Products	0.6	0.5	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Rubber & Plastic Products	5.0	4.9	4.9	4.9	5.0	5.0	5.0	5.1	5.1	5.0	5.0	4.8	4.7
Leather Products	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.5	0.5	0.5	0.5	0.5
NONMANUFACTURING, TOTAL	1,029.3	991.5	995.3	1,009.3	1,023.6	1,035.5	1,042.4	1,020.6	1,031.4	1,041.5	1,054.4	1,056.2	1,049.9
Mining & Quarrying	1.6	1.3	1.3	1.3	1.5	1.6	1.6	1.7	1.8	1.8	1.8	1.7	1.6
Construction	52.5	45.4	44.8	48.0	51.1	52.6	53.5	55.5	57.0	57.4	57.5	54.6	52.7
Building Construction	13.0	11.9	12.1	13.0	13.6	13.6	13.6	13.4	13.8	13.7	13.2	12.4	12.2
Heavy Construction	7.1	5.3	5.0	5.7	6.8	7.3	7.7	8.0	8.6	8.5	8.6	7.3	6.8
Special Trade Contractors	32.3	28.2	27.7	29.3	30.7	31.7	32.2	34.1	34.6	35.2	35.7	34.9	33.7

1990 Continued

	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Transport., Comm., & Utilities	63.8	63.1	62.9	63.3	63.3	64.0	64.1	63.4	64.2	64.1	64.5	64.3	64.3
Transportation	42.4	41.7	41.5	41.8	42.0	42.5	42.5	42.1	42.7	42.9	43.3	43.1	43.2
Railroad Transportation	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.7
Trucking & Warehousing	24.4	23.8	23.6	24.0	23.9	24.3	24.6	24.6	24.8	24.6	24.7	24.6	25.0
Other Transportation	14.3	14.1	14.1	14.0	14.3	14.4	14.1	13.7	14.1	14.5	14.8	14.7	14.5
Communications	12.3	12.5	12.5	12.3	12.2	12.3	12.3	12.1	12.3	12.3	12.3	12.3	12.2
Utilities	9.1	8.9	8.9	9.2	9.1	9.2	9.3	9.2	9.2	8.9	8.9	8.9	8.9
Wholesale & Retail Trade	313.2	303.3	299.6	302.6	306.6	310.0	313.9	315.8	324.1	320.1	318.2	321.4	323.0
Wholesale Trade	79.5	76.2	76.6	77.7	78.0	78.5	79.0	79.5	81.8	82.0	81.8	81.3	81.1
Durable Goods	45.9	44.4	44.6	45.2	45.6	45.9	46.5	46.5	46.8	46.3	46.5	46.5	46.5
Machinery, Equipment, & Sup.	10.8	10.5	10.5	10.6	10.7	10.8	10.9	10.9	10.9	10.9	10.9	10.9	10.8
Other Durable Goods	35.2	33.9	34.1	34.6	34.9	35.1	35.6	35.6	35.9	35.4	35.6	35.6	35.7
Nondurable Goods	33.5	31.8	32.0	32.5	32.4	32.6	32.5	33.0	35.0	35.7	35.3	34.8	34.6
Groceries & Related Products	12.8	12.0	12.0	12.0	11.7	11.6	11.8	12.1	13.9	14.6	14.2	13.7	13.5
Other Nondurable Goods	20.8	19.8	20.0	20.5	20.7	21.0	20.7	20.9	21.1	21.1	21.1	21.1	21.1
Retail Trade	233.8	227.1	223.0	224.9	228.6	231.5	234.9	236.3	242.3	238.1	236.4	240.1	241.9
Building Materials & Garden Sup.	8.8	7.7	7.8	8.2	8.7	8.8	9.1	9.2	9.5	9.3	9.2	9.1	8.8
General Merchandise Stores	30.5	31.3	29.5	29.0	29.3	29.4	29.8	30.3	30.6	30.3	30.6	32.1	33.9
Food Stores	39.5	38.0	37.6	37.9	38.3	38.8	39.6	40.3	44.6	40.7	39.7	39.5	39.3
Auto Dealers & Service Stations	28.0	27.4	27.3	27.5	28.0	28.3	28.2	28.2	28.6	28.4	28.3	28.0	27.8
Apparel & Accessory Stores	10.0	9.7	9.2	9.2	9.3	9.5	10.2	10.6	10.4	10.0	10.1	10.9	11.3
Furniture & Home Furnishings	9.6	9.6	9.4	9.6	9.5	9.6	9.7	9.4	9.5	9.5	9.5	9.8	9.9
Eating & Drinking Places	83.2	79.3	78.7	79.9	81.9	83.5	85.2	85.5	85.9	86.6	84.6	84.0	83.3
Miscellaneous Retail	24.1	24.1	23.5	23.6	23.6	23.6	23.1	22.8	23.2	23.3	24.4	26.7	27.6
Finance, Insurance, and Real Estate	79.2	76.1	77.0	77.6	78.3	79.2	79.9	80.8	80.6	80.6	80.0	79.9	80.4
Finance	28.5	28.3	28.4	28.3	28.3	28.4	28.4	28.7	28.7	28.7	28.4	28.4	28.4
Insurance	22.9	22.3	22.6	22.8	22.8	23.0	23.0	23.1	23.0	23.0	22.9	22.9	23.0
Real Estate	27.9	25.5	26.0	26.5	27.2	27.8	28.5	29.0	28.9	28.9	28.7	28.6	29.0
Services	295.9	282.8	286.8	291.8	295.6	295.8	295.6	296.5	299.2	301.6	302.4	301.3	300.8
Hotels & Other Lodging Places	19.6	17.0	17.5	18.1	19.0	19.7	20.9	21.7	21.8	20.9	20.3	19.4	18.9
Personal Services	11.1	10.9	11.2	11.3	11.4	10.8	10.9	10.9	11.0	11.1	11.1	11.1	10.9
Business Services	50.1	48.0	47.8	49.1	50.0	50.6	50.9	50.1	51.8	51.8	50.9	50.2	50.1
Automotive & Misc. Repair Services	16.8	15.8	16.0	16.4	16.7	16.9	16.8	17.0	17.4	17.1	17.3	17.1	17.1
Motion Pictures & Amusements	14.1	14.0	14.3	14.8	15.0	14.1	14.1	14.2	14.1	13.8	13.1	13.2	14.4
Health Services	85.0	83.0	83.4	84.1	83.9	84.2	84.9	85.5	85.5	86.2	86.3	86.6	86.7
Legal Services	8.9	8.7	8.7	8.8	8.7	8.8	9.0	9.1	9.2	9.0	8.9	8.9	8.9
Private Education	15.1	14.8	15.7	15.7	15.4	14.4	12.6	11.9	11.8	15.4	17.9	17.8	17.2
Social Services	27.0	26.1	26.4	26.6	27.3	27.8	26.6	26.3	26.3	27.3	27.7	28.1	28.0
Engineering & Management Services	20.8	19.2	20.1	20.5	21.2	20.9	20.9	21.0	21.2	21.0	21.2	21.4	21.4
Other Services & NEC	27.4	25.3	25.7	26.4	27.0	27.6	28.0	28.8	29.1	28.0	27.7	27.5	27.2
Government	223.2	219.5	222.9	224.7	227.2	232.3	233.8	206.9	204.5	215.9	230.0	233.0	227.1
Federal Government	34.1	31.7	31.2	31.8	34.5	36.6	37.8	36.2	35.0	35.3	33.9	33.1	32.4
State Government	60.6	59.5	60.8	61.2	60.8	61.3	62.8	58.2	57.8	57.5	62.6	62.5	61.7
Education	24.8	24.9	26.3	26.3	26.0	26.0	26.2	21.3	20.6	20.9	26.3	26.8	26.2
Other State	35.7	34.6	34.5	34.9	34.8	35.3	36.6	36.9	37.2	36.6	36.3	35.7	35.5
Local Government	128.5	128.3	130.9	131.7	131.9	134.4	133.2	112.5	111.7	123.1	133.5	137.4	133.0
Education	79.7	81.7	84.1	84.5	84.0	85.3	82.8	62.0	60.8	73.8	84.9	87.1	85.0
Other Local	48.8	46.6	46.8	47.2	47.9	49.1	50.4	50.5	50.9	49.3	48.6	50.3	48.0
LABOR-MANAGEMENT DISPUTES	0.4	0.5	0.6	0.9	0.9	0.5	0.3	0.4	0.6	0.3	0.3	0.0	0.0

1/ Includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonagriculture wage and salary, self-employed, unpaid family workers, domestics, agriculture and labor disputants. ALL DATA ARE IN THOUSANDS.

2/ Sum of monthly estimates divided by 12. Unemployment rate derived by dividing unemployment by civilian labor force.

3/ This nonagricultural wage and salary employment series is based on the 1987 Standard Industrial Classification (SIC) manual. The data are by place of work and persons working multiple jobs are counted more than once. Workers involved in labor-management disputes are excluded from the wage and salary employment totals. ALL DATA ARE IN THOUSANDS.

4/ Total nonagricultural wage and salary employment, seasonally adjusted and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's annual average employment (774.3) and that of 1977 (936.9).

5/ Goods producing industries include manufacturing, mining, and construction.

6/ Service producing industries include transportation, communications, & utilities; trade; finance, insurance, & real estate; services; and government.

Turning to the industry level changes between 1989 and 1990, an accompanying table shows each major industry and its annual average employment totals for these years. Manufacturing as a whole only grew by 400 jobs, or 0.2%. The big reason for this lackluster performance was of course the closures and cutbacks at many lumber and wood products mills. Lumber and wood products manufacturing continued to employ fewer people in 1990, as employment totals dropped by 3,700. Food & kindred products had a strong year, particularly in the summer and fall; this sector grew by 4.2%. The "high-tech" sector which includes electronic and other electrical equipment and components, measuring, analyzing, and controlling instruments, and computer and office equipment grew by 3.7%.

In nonmanufacturing, construction experienced tremendous growth of 13.9%. At an annual average of 52,500, construction employed more Oregonians in 1990 than in any year since 1979, when 53,000 worked in the industry.

Services, which was the most prominent producer of new jobs in the 1980s, started out the 1990s once again as the leader. Services added a net 13,000 new jobs in 1990, nearly twice as many as any other major industry sector, and equivalent to 4.6% growth for the year.

Government grew by 3.5%, more than the 3.2% average growth for total wage & salary employment. This government growth, which was faster than the average for other sectors, should be viewed in light of the added workers who completed the work on the U.S. Census. The 4.9% growth in federal government would not have been as large had it not been for this decennial head count.

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT BY MAJOR INDUSTRY
CHANGE: 1990 VS. 1989 ANNUAL AVERAGES

INDUSTRY	1990 AA	1989 AA	ACTUAL CHANGE	PERCENT CHANGE
TOTAL WAGE & SALARY	1,248,100	1,209,400	38,700	3.2
Goods Producing	272,900	266,000	6,900	2.6
Service Producing	975,200	943,400	31,800	3.4
Total Manufacturing	218,800	218,400	400	0.2
Lumber & Wood Products	63,600	67,300	(3,700)	-5.5
"High-tech" Industries	34,000	32,800	1,200	3.7
Other Durables	60,500	59,600	900	1.5
Food & Kindred Products	24,600	23,600	1,000	4.2
Other Nondurables	36,100	35,200	900	2.6
Total Nonmanufacturing	1,029,300	991,000	38,300	3.9
Mining & Quarrying	1,600	1,500	100	6.7
Construction	52,500	46,100	6,400	13.9
Transport., Comm., & Utilities	63,800	63,100	700	1.1
Wholesale & Retail Trade	313,200	305,900	7,300	2.4
Wholesale Trade	79,500	76,400	3,100	4.1
Retail Trade	233,800	229,500	4,300	1.9
Finance, Insurance, and Real Estate	79,200	75,900	3,300	4. 3
Services	295,900	282,900	13,000	4.6
Government	223,200	215,600	7,600	3.5
Federal Government	34,100	32,500	1,600	4.9
State Government	60,600	59,200	1,400	2.4
Local Government	128,500	123,900	4,600	3.7
LABOR-MANAGEMENT DISPUTES	400	1,800	(1,400)	-77.8

Another accompanying table shows the industries which performed the best and the worst in 1990. The biggest winners were in construction, where several sectors came through with large percentage gains: special trade contractors and building construction. Even the retail sector of construction reflected the strong construction demand, as building materials & garden supplies recorded a 12.8% growth rate. Note that one of the high-tech sectors shows up as a percentage growth winner: electronic & other electric equipment manufacturing, which posted an 11.5% growth rate. Two of the services industries, health services and business services, made it to the top of the "actual change" winners column.

The losers make up a who's who in lumber and wood products. Veneer & plywood, logging, and sawmills had the largest actual declines in employment, while logging had the largest percentage employment decline. Other manufacturing industries reduced employment levels as well, with instruments & related products and fabricated metals both showing large declines.

Tables containing all of the revised employment totals for 1989 and 1990 are provided elsewhere in this publication. □

WINNERS AND LOSERS —
ANNUAL AVERAGE EMPLOYMENT CHANGE, 1989 TO 1990

ACTUAL CHANGE

WINNERS		LOSERS	
Special Trade Contractors	+ 4,600	Veneer and Plywood	- 1,400
Health Services	+ 3,000	Logging	- 1,400
Local Government Education	+ 2,700	Sawmills	- 1,100
Real Estate	+ 2,400	Fabricated Metals	- 800
Business Services	+ 2,200	Instruments & Related Products	- 600

PERCENT CHANGE

WINNERS		LOSERS	
Special Trade Contractors	+ 16.6%	Logging	- 11.2%
Transportation Equipment, Mfg.	+ 12.9%	Textile Mill Products	- 11.1%
Building Materials & Garden Supplies, Retail	+ 12.8%	Veneer & Plywood	- 8.9%
Electronic & Other Elect. Equip., Mfg.	+ 11.5%	Fabricated Structural Metals	- 5.7%
Building Construction	+ 11.1%	Other Fabricated Metals	- 5.6%

THE TWO OREGONS
Comparing Economic Conditions in Rural & Urban Counties

Tami Miller

(Editor's note: Tami Miller is staff to the Joint Legislative Trade & Economic Development Committee.)

The flower of economic recovery is in full bloom in Portland — employment is improving, per capita income is growing, and new businesses are sprouting up throughout the tri-county region. Yet, in much of rural Oregon, the seeds of recovery have scarcely begun to grow. Lagging far behind the urban areas of the Willamette Valley, many rural Oregon communities have not responded to improved economic conditions — mills remain closed, hospitals are shutting their doors, and jobs lost have not been recovered.

In addition, two new events are threatening to keep rural recovery at a standstill. First, a number of rural, timber-dependent communities are faced with the imminent closure of their logging operations and wood products mills, due to reduced timber harvests and new environmental protection policies. Job loss estimates for the state run as high as 25,000 by 1995. Second, most economists agree that America has entered a national recession, one that will put the brakes on the economy in 1991.

The combination of the timber industry crisis and a recession, added to what is already a very difficult situation for much of rural Oregon, makes this a critical time for Oregon legislators, economic development practitioners, and rural leaders to look seriously at ways to strengthen and improve rural economies.

The Joint Legislative Committee on Trade and Economic Development is responding to the situation. The committee made rural economic development the focus of its interim hearings during the 1989-91 biennium. It also released a report on rural economies, entitled *The Two Oregons: Comparing Economic Conditions in Rural & Urban Counties*.

The Two Oregons attempts to measure the level of disparity between urban and rural areas of the state. Key indicators of economic health, such as population growth, migration patterns, income, wages, levels of education, and employment in major industries are compared.

The findings show that what economists have dubbed "The Two Oregons"—an economic division of the state into regions of haves and have nots—is not far from fact. While it is true that some rural communities, especially those in some central and southwestern counties, have made a remarkable recovery since the recession of the early 1980s, the rest of rural Oregon clearly lags its urban cousins in wages, income, and jobs. Most disturbing are the trends that indicate these gaps are not closing.

In particular, findings show that rural Oregon has the following characteristics:

2.4% higher average unemployment

16% lower real per capita income

13% lower average weekly wages

A slower rate of job recovery

Continuing reliance on the declining timber industry

Significant loss of jobs in high wage industries like timber, mining, and construction

A number of other trends raise specific concerns for the economic future of the state's rural regions:

Fewer College Graduates in Rural Areas

A rural resident is one-third less likely to be a college graduate than an urban resident. This has serious implications for economic development, because a rural workforce with less education will be less likely to develop or attract new industries that pay family wages, the kind of industries that require well educated, highly skilled workers.

More Rural Schools In Safety Net

Seventy-five percent of the 46 schools in the state's safety net are located in rural counties. Having their schools in the safety net jeopardizes the quality of education the schools can offer. It also puts these rural areas at a double disadvantage. First, poor schools may make it difficult to retain current residents with school-age children, and second, this circumstance may make it particularly difficult to attract new families and/or businesses that would employ new and existing residents.

Rural Unemployment Rates are Higher

Three-fourths of rural counties had unemployment rates above 7.0% in 1989, with the highest rate reported at 11.5%. Urban county unemployment rates averaged 5.0%; no urban county had an unemployment rate above 7.0%.

Rural Oregon Lags In Earnings Power

Real per capita income in rural Oregon lagged urban income by 16% in 1988. That gap has remained the same since 1984. In addition, average weekly wages were 13% lower than urban wages in 1989. Compared to the cost of living, the gap between rural and urban average weekly wages was 2% larger than the gap between the cost of living in rural and urban areas. Translation: it costs less to live in rural areas, but probably not enough less to fully compensate for the difference in average wages.

Fewer Jobs for Rural Oregonians

During the recessionary period between 1979 and 1982, jobs in rural Oregon declined by 11%. Urban jobs declined 8%. Since 1982, rural Oregon has retrieved its jobs more slowly, at only a 2.8% rate, while urban Oregon has added jobs at a 3.4% rate. Rural Oregon has lost proportionately more jobs and has been regaining them far more slowly than urban Oregon.

Rural Oregon Still Highly Dependent on Timber Industry

Rural Oregon has lost over 8,200 jobs in the timber industry since 1978, yet 14% of its jobs are still in wood products manufacturing. It is expected that another 11,100 jobs will be lost by 1995. Timber dependency in urban areas is much lower—only 4% of urban jobs are in wood products. Without economic diversification, rural area reliance on the timber industry will continue to leave it vulnerable to the devastating effects of downturns such as the state is now experiencing.

More Seniors Are Moving to Rural Areas

Rural Oregon is home to proportionately more seniors than urban Oregon, 3% more. Population trends indicate that more seniors are migrating from out-of-state and from urban areas to Oregon's rural environs. Data on transfer payments as a percentage of county income indicate that counties along the north coast, southwest border, and in the northeast corner of the state have the largest concentrations of seniors.

While an influx of seniors can have a positive impact on a community, it can also create demand for costly new infrastructure, such as expanded hospital and health care services. Seniors living on fixed incomes also can be

resistant to change and new development, refusing to vote for tax increases needed to finance community growth.

How can these trends be reversed? And, how should the state respond? These are questions the Trade Committee asked of many rural residents, economists, economic development program managers, and rural development experts who testified during the interim. The most frequent response was not to provide more money, but to level the playing field between rural and urban areas by providing rural Oregon with the technical assistance and training it needs to accurately assess its economic opportunities, plan strategically for its future, and be competitive with urban areas for existing state and federal resources.

Trade Committee Responds with Rural Institute Bill

In response to this request, the Trade Committee is sponsoring SB 713, the Rural Revitalization and Leadership Development Act. The bill will provide for the financing and establishment of a Rural Development Institute that will provide comprehensive community development assistance and leadership training to rural Oregon.

"We want to help rural Oregonians develop the skills and capacity they need to help themselves," explains the Committee Co-Chair, Senator Wayne Fawbush. "In the past, our economic development efforts have focused on bricks and mortar—business recruitment and infrastructure projects. This strategy hasn't been successful in most areas. It didn't allow communities to build up the capacity needed to sustain development and good economic health from within."

"But, developing the skills and abilities of rural residents will," added House Co-Chair, Representative Ray Baum. "We want to make an investment in rural Oregonians, one that will pay significant, long term economic development dividends. We won't abandon rural infrastructure development, but we want to try to link our brick and mortar investments to sound analysis and planning based on a community's potential. And most importantly, we want rural communities to have the skills and assistance needed to determine what investments they want to make."

AVERAGE HOURS AND EARNINGS OF OREGON INDUSTRIAL PRODUCTION WORKERS[1]

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Jan.[2] 1991	Dec.[3] 1990	Jan. 1990	Jan.[2] 1991	Dec.[3] 1990	Jan. 1990	Jan.[2] 1991	Dec.[3] 1990	Jan. 1990
TOTAL MANUFACTURING[4]	$440.45	$453.60	$428.07	38.4	40.0	38.6	$11.47	$11.34	$11.09
Durable Goods	439.68	454.86	432.62	38.4	39.9	38.8	11.45	11.40	11.15
Lumber & Wood Products	415.15	433.86	432.23	37.1	38.6	38.8	11.19	11.24	11.14
Logging & Sawmills	439.93	457.76	453.01	36.6	37.8	38.1	12.02	12.11	11.89
Veneer & Plywood	393.08	426.41	424.54	36.6	39.3	39.2	10.74	10.85	10.83
Millwork & Structural	368.01	362.52	393.31	37.9	38.0	40.8	9.71	9.54	9.64
Mobile Homes	349.90	393.96	350.97	36.6	40.2	37.1	9.56	9.80	9.46
Other Wood Products	446.31	478.16	428.29	40.5	43.0	38.9	11.02	11.12	11.01
Furniture & Fixtures	371.64	371.14	326.16	34.7	38.5	36.0	10.71	9.64	9.06
Primary Metals	547.38	536.36	468.23	42.4	42.3	37.7	12.91	12.68	12.42
Fabricated Metals	414.70	421.51	392.09	37.7	38.6	37.2	11.00	10.92	10.54
Machinery (Ex Electrical)	436.80	456.20	437.47	39.0	40.3	39.2	11.20	11.32	11.16
Nondurable Goods	442.37	452.79	414.91	38.4	40.5	38.1	11.52	11.18	10.89
Food & Kindred Products	351.61	377.34	346.82	36.1	40.1	36.7	9.74	9.41	9.45
Canning & Preserving	298.64	320.76	295.30	35.3	39.6	36.1	8.46	8.10	8.18
Other Food Products	414.04	442.00	405.42	37.1	40.7	37.4	11.16	10.86	10.84
Textile Mill Products	262.55	294.23	246.20	35.1	39.6	34.1	7.48	7.43	7.22
Apparel	268.60	277.61	261.02	37.1	39.1	38.9	7.24	7.10	6.71
Paper & Allied Products	692.66	675.38	646.80	43.4	42.8	42.0	15.96	15.78	15.40
Printing & Publishing	484.45	502.54	429.84	37.7	39.2	36.0	12.85	12.82	11.94
Construction[4]	571.51	575.28	546.93	34.7	36.0	35.4	16.47	15.98	15.45
Communications & Utilities[5]	597.37	614.79	594.05	41.0	41.4	41.6	14.57	14.85	14.28
Trade[5]	268.40	333.70	313.56	30.5	35.5	33.5	8.80	9.40	9.36
Wholesale Trade	429.00	448.87	417.01	37.5	39.1	37.2	11.44	11.48	11.21
Retail Trade	214.60	277.35	263.11	28.2	33.7	31.7	7.61	8.23	8.30
Banking & Insurance[5]	372.60	399.06	338.33	36.0	39.2	34.7	10.35	10.18	9.75
State & Local Government	424.90	424.85	405.15						

[1]Figures are average gross hours and earnings of full and part-time worked or paid for, including overtime and shift premium pay. Prepared in cooperation with the U.S. Department of Labor. All data are based on the 1987 Standard Industrial Classification (SIC) codes.

[2]Preliminary

[3]Revised

[4]Data for production workers only and exclude administrative, supervisory (above working foremen), technical, sales and office personnel.

[5]Data for nonsupervisory employees only, excluding proprietors and executive personnel. Prior to 1991, data for retail trade excludes eating and drinking places.

The Institute will offer two specific types of assistance to rural communities. First, it will engage rural communities in a development process that will involve assessing their social and economic strengths, weaknesses, and opportunities, as well as any obstacles or threatening events that may face them. Assessments will be followed up with a strategic planning effort by the community. Strategic plans will identify where communities would like to see themselves in the future and map out a course of actions and projects needed to reach their goals.

The process does not stop there. The Institute will also provide leadership training to community residents. The training will be designed to provide residents with the skills they needed to make the community planning and development process more effective. They will be taught how to facilitate consensus, manage conflicts, build community support, lead group meetings, craft an agenda, and other leadership skills. The leadership program will also provide training in public speaking and presentation and will teach participants how to work with local and state governments, federal programs, and the legislature.

Hearings on SB 714 will be scheduled for mid-March. For more information about The Two Oregons or the the Rural Institute proposal, please call the Trade Committee Office at 378-8811. □

RURAL OREGON SUMMARY STATISTICS

	RURAL	URBAN	STATE
POPULATION - 1990	892,180	*1,899,000	2,791,180

*Includes Clackamas, Jackson, Lane, Marion, Multnomah, Polk, Washington and Yamhill counties.

AGE DISTRIBUTION - 1988

AGES	RURAL	%	URBAN	%	STATE
0-17	225,611	25%	477,991	25%	703,602
18-24	101,489	11%	200,279	11%	301,768
25-55	352,422	39%	824,150	43%	1,176,572
55+	212,478	24%	396,580	21%	609,058

SEX - 1987					
Female:	437,315	50%	933,503	51%	1,370,818
Male:	430,385	50%	891,697	49%	1,319,182

EDUCATION - 1980	RURAL	URBAN
% of High School Graduates	72%	77%
% of College Graduates	14%	20%

	RURAL	URBAN	U.S.
UNEMPLOYMENT RATE - 1989	7.4%	5.0%	5.3%
PER CAPITA INCOME - 1988	$13,171	$15,696	$16,490
	(Oregon Ranked 30th in U.S. in 1987)		
AVERAGE WEEKLY WAGE - 1988	$327.11	$374.78	N/A

INDUSTRY EMPLOYMENT - 1989	RURAL	%	URBAN	%
All Jobs, All Industries	309,460		874,426	
Wholesale & Retail	74,319	24	231,750	27
Government	64,007	21	135,105	15
Services	56,686	18	204,406	23
Forestry & Wood Products	44,844	15	38,820	4
Agriculture/Food Process.	17,519	6	34,043	4
Transportation & Utilities	13,515	4	45,462	5
Finance	9,344	3	51,284	6
Construction	9,331	3	35,690	4
Machinery & Equipment	8,366	3	49,596	6
Other Manufacturing	6,434	2	27,845	3
Metals	3,585	1	19,617	2
Fisheries	923	0.3	79	0
Mining	587	0.2	729	0.1

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